

**LFD Staff Services
Project Management Outline
Final 11/07/2007**

1. What is the purpose of this project, what are we trying to accomplish?
 - a. Evaluate adequacy and allocation of staff resources
 - b. Evaluate priority of current LFD products and/or need for new products, in relation to agency mission
 - c. Evaluate usefulness and appropriateness of LFD internal systems tools
2. What is the scope of the review for LFD products?
 - a. **Must review:** Session related-required (**see List 1**)
 - b. **Optional, as time allows:**
 - i. Session related-optional (**see List 2**)
 - ii. Interim publications (**see List 3**)
 - iii. Other publications (**see List 4**)
3. What is the possible impact/outcome of this project?
 - a. LFD management will have staff feedback on workload, expertise, and other comments on staff resources and can use it in their deliberation of 1a above.
 - b. “Mission-critical” LFD products, current and new, will be identified
 - c. Low priority LFD products will be identified
 - d. Duplication, inefficiencies will be identified
 - e. LFD Goals/Objectives may be revised
 - f. Additional and/or alternative uses of internal system tools may be identified
4. How will the project work be done?
 - a. Kris and Pam are assigned to this project
 - b. Staff resources evaluation will be accomplished via a written survey to LFD staff
 - c. LFD product evaluation will be accomplished via 2 or 3 staff review/brainstorming sessions, lasting about 3 hours each. The number of sessions will be determined by the effectiveness of the sessions (are they productive?) and the scope (breadth/depth) of the study.
 - d. LFD internal systems evaluation will be accomplished via a written survey to LFD staff

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- e. **If time allows**, internet survey of surrounding states **to evaluate substance** of “Budget Analysis, Fiscal Report, Revenue Estimates”-type publications in other states, **as well as evaluate format and readability/understandability** of other states’ documents to determine if LFD could/should incorporate into our documents
5. How long will this project take? What is our time frame?
- a. Overall project needs to be done by March 2008 LFC meeting
 - b. Project will run in three tracks: staff resources, LFD publications, and LFD internal systems
 - c. Staff resources survey can be distributed any time. Prefer to send it out in November and get responses back w/in 10 days, so we can forward to LFD management and LFC Management Advisory workgroup at the December meeting.
 - d. LFD publications subproject should probably precede LFD internal systems, because if we determine we are producing something that is not essential, we would want to eliminate the internal system tool (if appropriate)
 - i. Hold first session in November if possible. If not possible in November, hold it immediately following Dec LFC meeting.
 - ii. Hold second session in early December, or late January.
 - iii. Hold third session, if necessary, in late January or mid-February
 - e. LFD internal system tools survey – distribute in Dec or January, with 10-day reply period
6. Reports
- a. LFD staff resources – internal report of survey responses will be provided to LFD management
 - b. LFD internal systems – internal report of survey responses will be provided to LFD management
 - c. LFD product evaluation
 - i. Brief written report following each brainstorming session will be provided to LFD management, as means to keep management informed of progress
 - ii. **If time allows for internet research**, written report summarizing research findings will be provided to LFD management
 - iii. Final report, containing substantive findings and proposed changes (if any), will be prepared in time for presentation to the March 2008 LFC meeting

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Tasks and Estimated Time Line (status as of 11/21/07)

Month/day	Staff Resources	Internal Systems Tools	LFD Publications
2 nd wk of Nov /	1. Team mtg to finalize work plan (met 11/7)	1. Team mtg to finalize work plan (met 11/7)	1. Team mtg to finalize work plan (met 11/7)
By team mtg date	2. Draft LFD staff survey (completed)	2. Draft internal systems tools survey (completed)	2. Tentative schedule for brainstorming sessions (Scheduled for 12/19, 1/22, and 2/7)
NLT Nov 9	3. Distribute LFD staff survey (Distributed 11/9)		
NLT Nov 19	4. Collect staff survey (Collected 11/19)		
NLT Nov 26	5. Review staff surveys and compile responses into report to LFD management (report emailed to management on 11/21)		3. Prepare draft materials to be used during brainstorming sessions (agency goals/objectives, description of each LFD publication, "scoring" document to identify relevance to agency mission and audience)
NLT Nov 28	6. Prepare project status report for LFD Management Advisory Committee		
Dec 13		3. Distribute internal systems tool survey	
Mid-Dec			4. Brainstorming session #1 Dec 19th, 9 am to Noon
			5. Summary report to LFD management
Mid-January		4. Collect internal systems tool survey	6. Brainstorming session #2 Jan 22nd, 9 am to Noon
		5. Review survey and compile responses into report to LFD management	7. Summary report to LFD management
Early-February			8. Brainstorming session #3 Feb 7th, 9 am to Noon
			9. Summary report to LFD management
NLT Feb 20	Legislative survey addressing staffing levels and expertise		10. Prepare final report, containing substantive findings and proposed changes (if any), for presentation to March 2008 LFC meeting

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Staff Resources Survey – Distribute 11/9/07, Collect 11/19/07

Please answer the following questions. Your response, which can remain anonymous, will be used by LFD management to evaluate the need for additional staff or reallocation of staff resources.

1. Over the past 5 years, have time constraints, unavailability of information, or other barriers prevented you from responding to a legislative request, completing a work plan item, or preparing as comprehensive a budget analysis as you think you should or could? If yes, provide details, including the frequency of this occurrence and the primary reason(s) for being unable to provide the service or product.
2. Are you aware of and/or do you believe there are areas of expertise needed or wanted by the Legislature that are not currently being met by the LFD that appropriately could be or should be? If yes, list the areas that need more attention.
3. Do you have any recommendations for reallocating staff resources within the office to better meet legislative needs? If yes, please be as specific as possible so your idea can be fully understood and evaluated.

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Internal Systems Tools – Distribute 12/13/07, Collect 1/15/08

Please answer the following questions. Your response, which can remain anonymous, will be used by LFD management to evaluate the need for changes to our internal systems tools

Below is a list of LFD internal systems tools that are used to varying degrees by LFD staff. For each system listed, please answer the following questions:

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? (*please specify*)
- What do you use the system for?
- What do you wish you could do with the system?

A. SABHRS Link System (including HR)

- i. Do you use this system? If so, what part of the system do you use the most?
- ii. Are there parts you don't use? (*please specify*)
- iii. What do you use the system for?
- iv. What do you wish you could do with the system?

B. Agency Finances – Inventory System

- i. Do you use this system? If so, what part of the system do you use the most?
- ii. Are there parts you don't use? (*please specify*)
- iii. What do you use the system for?
- iv. What do you wish you could do with the system?

C. Agency Expenditure Profile – Growth Project

- i. Do you use this system? If so, what part of the system do you use the most?



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- ii. Are there parts you don't use? *(please specify)*
- iii. What do you use the system for?
- iv. What do you wish you could do with the system?

D. Budget Analysis Tools Suite (BATS)

- i. Do you use this system? If so, what part of the system do you use the most?
- ii. Are there parts you don't use? *(please specify)*
- iii. What do you use the system for?
- iv. What do you wish you could do with the system?

E. Revenue Estimate Updates

- i. Do you use this system? If so, what part of the system do you use the most?
- ii. Are there parts you don't use? *(please specify)*
- iii. What do you use the system for?
- iv. What do you wish you could do with the system?

F. HB 2 Session Tools

i. HB 2 Amendment Tracking System

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? *(please specify)*
- What do you use the system for?
- What do you wish you could do with the system?

ii. HB 2 Reconciliation

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? *(please specify)*
- What do you use the system for?
- What do you wish you could do with the system?



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iii. Generate HB 2 versions

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? (*please specify*)
- What do you use the system for?
- What do you wish you could do with the system?

iv. Fiscal Note Tracking System

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? (*please specify*)
- What do you use the system for?
- What do you wish you could do with the system?

The following systems are not exclusively LFD systems, but we use them extensively. Your feedback is important, and will be forwarded to the “owners” of these systems.

v. LAWS

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? (*please specify*)
- What do you use the system for?
- What do you wish you could do with the system?

vi. MBARS

- Do you use this system? If so, what part of the system do you use the most?
- Are there parts you don't use? (*please specify*)
- What do you use the system for?
- What do you wish you could do with the system?

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Other (*please specify*)

What LFD tools do you need more training in? How often should this training occur? When should this training occur?

Do you have any problems, issues, or concerns with any of the internal system tools on the survey sheet? If yes, please describe as specifically as possible so a resolution to address the problem(s) can be identified and implemented.

Do you think there is any unnecessary duplication in the LFD internal system tools? If yes, please describe as specifically as possible so a resolution to address the problem(s) can be identified and implemented.



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List 1 Session-related, Required Publications

1. LFD Budget Analysis
 - a. Volume 1 -- Budget Overview/Statewide Summary
 - i. Biennium Budget Overview
 - ii. State Fiscal Outlook, Challenges, and Issues
 - iii. General Fund Outlook
 - iv. Other Fiscal Issues to Consider
 - v. General Reference
 - b. Volume 1 -- Executive Budget Analysis
 - i. Overview
 - ii. Budget Comparisons
 - iii. Revenue Proposals
 - iv. Expenditure Proposals
 - v. Statewide Budget Proposals/Issues
 - vi. Other LFD Issues
 - c. Volume 2 -- Revenue Estimates/Economic Assumptions
 - i. Montana Economic Outlook
 - ii. Estimates by Revenue Source
 - d. Volumes 3 and Up -- Analysis of Individual Agencies and Programs
 - i. Agency Proposed Budget (main table)
 - ii. Total Agency Funding
 - iii. Biennial Budget Comparison
 - iv. New Proposals
 - v. Program Proposed Budget
 - vi. Program Funding Table
 - vii. Present Law Adjustments
 - viii. New Proposals



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- ix. LFD Comment
- x. LFD Issue
- xi. 200x Biennium Report on Internal Service and Enterprise Funds
- xii. Agency and Program Highlights Table
- 2. Legislative Fiscal Report
 - a. Volume 1 – Statewide Perspectives
 - i. Biennium Budget Overview
 - ii. State Fiscal Outlook, Challenges and Solutions
 - iii. Legislative Budget Summary
 - iv. Budget Comparisons
 - v. Other Budget or Fiscal Issues
 - vi. Next Biennium Outlook
 - vii. General Reference
 - b. Volume 2 – Revenue Estimates
 - i. General Fund Revenue Estimates
 - ii. Revenue Impacts of Other Legislation
 - iii. Non-General Fund Revenue Estimates
 - iv. Summary of Tax Policy and Revenue Initiatives
 - v. Economic Outlook for Montana
 - vi. Estimates by Revenue Source
 - c. Volumes 3 and 4 – Agency Budgets
- 3. RTIC Revenue Estimates
- 4. General Fund Status Sheet
- 5. HB 2 Explanatory Narrative
- 6. LFD Website (Web Development and Maintenance)

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List 2 Session-related, Optional Publications

1. Big Picture Report
2. Legislator Orientation
3. HB 2 The Barbarian
4. Understanding State Finances
5. Agency Templates
6. Agency Profiles
7. Fiscal Pocket Guides
8. Performance Management Reporting System (effective 2009 Biennium)

List 3 Interim Publications

1. General fund revenue reports
 - a. LFC quarterly update
 - b. RTIC quarterly update
 - c. Legislative Council quarterly update
2. Finance Committee Reports
 - d. Required reports
 - e. Budget amendments
 - f. OP Plan changes
 - g. Staff reports
 - h. Bulldog reports
 - i. Agency Performance reports
3. State Fund Budget Analysis (annual)
4. LFD Website (Web Development and Maintenance)

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List 4 All Other Publications

1. Federal Funds database (Dec 2007)